



304 Hickman Road  
Charlottesville, Virginia 22911  
Phone: 434-817-4001  
[www.vawills.com](http://www.vawills.com)

## Confidential Estate Planning Information

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Before you begin:

This questionnaire has been designed to help you, not frustrate you. Complete it as best you can and bring it with you to your first meeting at our office. Do not spend an inordinate amount of time on it, and do not be concerned if you are unable to provide all the financial information we request on the form. Please know that all information you provide on this questionnaire will be held in strict confidence by the attorneys and staff at Virginia Wills, Trusts & Estates PLC.

### Directions to our Pantops office:

**From I-64:** Take I-64 to Exit 124, which is the Pantops / Route 250 entrance into Charlottesville. Go west towards Charlottesville for about 8/10ths of a mile, then turn left onto State Farm Boulevard. Once you are on State Farm Boulevard, get in the right hand lane. After you pass the BB&T Bank on your right, turn right onto Hickman Road. We are on the left hand side of Hickman Road, the third building from the end of the street.

**From Charlottesville:** Take the Route 250 By-Pass (East) to the top of Pantops Mountain. About 1/10th of a mile after you crest the hill, turn right onto State Farm Boulevard (immediately after the DMV office.) From the right hand lane on State Farm Boulevard, after you pass the BB&T Bank on your right, turn right onto Hickman Road. We are on the left hand side of Hickman Road, the third building from the end of the street.

## I. CLIENT CONTACT INFORMATION

**Home Address** Street: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Your residence is located in which city or county? \_\_\_\_\_

Who referred you to this law firm? \_\_\_\_\_

Signature of person who completed this questionnaire: \_\_\_\_\_

How would you prefer to receive first drafts of estate planning documents:

- In a PDF/scan via e-mail       Paper copies via US mail

### Partner 1

### Partner 2

Full Legal Name	_____	_____
Date of Birth	_____	_____
Preferred Phone	_____	_____
Occupation	_____	_____
Employer	_____	_____
E-Mail Address	_____	_____

## II. YOUR CHILDREN

Full Legal Name	Date of Birth	Parent <sup>1</sup>	City of Residence

<sup>1</sup>P1 (Partner 1); P2 (Partner 2)

### III. YOUR FINANCIAL SUMMARY

Please use estimated current fair market values.

ASSETS	Jointly Titled	Partner 1	Partner 2
Primary Residence			
Second Residence**			
Other Real Estate**			
Cash & Equivalents <sup>1</sup>			
Marketable Securities <sup>2</sup>			
Business Interests <sup>3</sup>			
Partnerships & LLC <sup>4</sup>			
Retirement Accounts <sup>5</sup>			
Annuities			
Valuable Tangibles <sup>6</sup>			
Total Death Benefit from all Life Insurance <sup>7</sup>			
Other Valuable Assets <sup>8</sup>			
<b>TOTAL ASSETS</b>			
<b>LIABILITIES</b>			
Mortgage, Residence			
Mortgage, 2 <sup>nd</sup> Residence			
Other Debts			
<b>TOTAL DEBTS</b>			
<b>NET WORTH</b>			
<b>Estimated Inheritance***</b>			

\*\* Indicate location(s) of your second residence or other real estate in Section IX.

\*\*\* What you believe you might inherit from others.

**Do you own a website or blog? YES      NO**

**If yes, identify the URL: [**

**]**

<sup>1</sup> Checking, savings, money market accounts, certificates of deposit, etc.

<sup>2</sup> Stocks, bonds, mutual funds, real estate investment trusts, and limited partnerships that are publicly traded.

<sup>3</sup> Businesses in which you actively participate.

<sup>4</sup> Partnerships and LLC interests which are not publicly traded.

<sup>5</sup> Retirement benefits provided through an employer such as a 401-k, IRA's, TIAA-CREF, etc.

<sup>6</sup> Automobiles, furnishings, jewelry, and collections, e.g., a coin or art collection.

<sup>7</sup> Please insert the total insurance proceeds from the "Death Benefit" line of Section V, next page.

<sup>8</sup> Any other valuable assets not listed above.

## IV. ONLINE ACCOUNTS AND DIGITAL ASSETS

Do you **bank online**? Or have a significant presence on **social media** such as Facebook or Twitter? Or engage in regular **online purchases** or sales through companies such as Amazon, iTunes, or eBay? Or maintain your own **website or blog**? If you answered “yes” to any of these questions, it is vital that you leave your loved ones with sufficient information to locate and access your online accounts and “digital assets.”

Digital assets, which can be quite valuable, include your email accounts, data you have stored on a hard drive, CD, DVD, server, or in the cloud (i.e., someone else's server), domain names, websites and blogs that you own, your music files and video games, and that unfinished novel on your laptop.

The estate planning documents we prepare will grant your executors, trustees, and agents under powers of attorney the authority to access your online accounts and digital assets. Your agents may use this access to gain possession of digital assets, close out online accounts, prevent post-mortem identity theft, and generally gather information needed to settle your worldly affairs. However, companies that host your email and web presence are likely to be unhelpful to your authorized agents seeking user names and passwords needed to access your online accounts and digital assets upon your death. State and federal laws in place at this time are not helpful either.

**Therefore, we strongly recommend you maintain a master list that (i) identifies and locates your online accounts and digital assets and (ii) contains your user names, passwords and other information necessary to access these accounts and assets.** You must take this step on your own. It is independent of any services we might provide. You can make use of an excellent template prepared by Minnesota attorney James D. Lamm, found at this link: <http://www.digitalpassing.com/digital-audit/>.

Be sure to store any user name and password information in a secure location, such as a safe deposit box or a home safe. Let your loved ones know where to find your master list when it is needed. Keep it updated as you add accounts and change passwords.

## V. YOUR LIFE INSURANCE

	Policy 1	Policy 2	Policy 3	Policy 4
Insured				
Owner				
Company				
Type <sup>1</sup>				
Policy Number				
Beneficiary				
Death Benefit				
Cash Value				

<sup>1</sup> P (Permanent); T (Term); G (Group Term)

## VI. THE KEY PEOPLE IN YOUR ESTATE PLAN

When we meet, we will discuss appropriate choices for executors, trustees, and other agents under your estate planning documents. Your selections will be among the most critical decisions you will make in your estate planning. A helpful starting point for our discussion will be your initial inclinations as to the persons who might fill these roles. While spouses do not necessarily have to choose the same persons, it is preferable in most cases. In those situations where you wish to make different choices, sufficient space has been left in the table below for this purpose. Please include formal names and a current city and state for the persons you select.

	<b>1<sup>st</sup> Choice</b>	<b>2<sup>nd</sup> Choice</b>	<b>3<sup>rd</sup> Choice</b>
<b>Executor(s)<sup>1</sup></b>			
<b>Trustee(s)<sup>2</sup></b>			
<b>Agent(s) under Financial Power of Attorney<sup>3</sup></b>			
<b>Agent(s) under Medical Power of Attorney<sup>4</sup></b>			
<b>Guardian(s) for your Minor Children<sup>5</sup></b>			

<sup>1</sup> Someone to settle your estate upon your death. This can be your partner, adult children, other family members, trusted friends or a professional executor, such as an attorney or a bank.

<sup>2</sup> Someone to administer any trusts you may establish during your life or upon your death. This can be your partner, adult children, other family members, trusted friends or a professional trustee, such as an attorney or bank.

<sup>3</sup> Someone to handle your financial and administrative affairs for you if you become incapacitated.

<sup>4</sup> Someone to make health and medical treatment decisions for you if you become incapacitated.

<sup>5</sup> Someone to raise your children if you die while any child is under 18.

## VII. QUESTIONS FOR YOU

#	Question	Yes	No
1	Has either of you been previously married? <sup>1</sup>		
2	Have you signed a domestic partnership agreement of some kind?		
3	Is either one of you a citizen of a country <b>other</b> than the United States?		
4	Are any of your children adopted?		
5	Do you have a deceased child?		
6	Do you have any beneficiaries with physical or mental disabilities?		
7	Does either of you own assets jointly with any person other than your partner? <sup>2</sup>		
8	Does either of you own an interest in a closely held business? <sup>3</sup>		
9	Are either of you the beneficiary of a trust created by someone else?		
10	Does either of you have any existing wills, trusts, or other estate planning documents?		
11	Does either of you own real property outside Virginia?		
12	Has either of you made gifts in excess of \$10,000 to any person in any single year?		
13	Is either of you interested in making gifts at death to any tax exempt organization?		
14	Do you anticipate major change in assets, liabilities or income in the next few years?		
15	Are you concerned about the safety of any adult beneficiary's inheritance due to the beneficiary's serious marital or financial instability?		
16	Does either of you own any insurance on the life of another person?		
17	Is there any person who is financially dependent upon either of you?		
18	Do you or any family member have any significant health issues or disabilities?		
19	If you are ever in a terminal condition, should artificially administered hydration and nutrition be utilized to prolong your life? Mark <b>Yes</b> if you are not sure.		
20	Is there any additional information or concerns about which you think your attorney should know? If so, please explain on the following page.		

<sup>1</sup> If yes, please indicate on the following page when the marriage ended and whether there are any current obligations to pay child support, spousal support or maintain life insurance.

<sup>2</sup> If yes, please describe on the following page the joint ownership, including the name of the joint owner(s) the asset, and the percentage owned.

<sup>3</sup> If yes, please specify on the following page what type of business (e.g., C Corporation, S Corporation, Limited Liability Company, etc.), and the percentage owned.

## VIII. YOUR PROFESSIONAL ADVISORS

<b>Accountant</b>	
<b>Investment Advisor / Financial Planner</b>	
<b>Life Insurance Agent</b>	
<b>Family Doctor</b>	
<b>Other</b>	

Would you like us to send copies of any estate planning documents you may sign to your investment advisor or any other financial professional? YES      NO

If yes, please include addresses in the space below:

## IX. YOUR COMMENTS

<u>Question No.</u>	<u>Comments</u>
	Location of Second Residence or other Real Estate Identified in Section III  1.  2.  3.

## OUR BILLING PRACTICES

As part of the estate planning process, we generally:

1. Review and discuss your current estate planning documents, personal financial statement, retirement death benefits, and life insurance policies.
2. Recommend and prepare a new or altered estate plan that typically includes a last will and testament, a revocable living trust, a durable financial power of attorney, and an advance medical directive.
3. Supervise and participate in the execution of new estate planning documents.
4. Assist with beneficiary designation changes appropriate to the new estate plan and recommend changes in asset ownership, if necessary.

Whenever it is practical to do so, we prepare estate planning documents for a fixed fee, as opposed to hourly billing. This fee reflects (i) the value of the services provided, (ii) the level of expertise required, and (iii) the anticipated time and effort involved on our part. We are usually able to provide clients with a “not-higher than” fee quote at the conclusion of our first meeting. In certain cases, a fixed fee may not be a practical option. Some clients may want us to assist them in ways that go beyond the scope of the services outlined above. Under those circumstances, we will discuss hourly rate billing with the client.

If your estate planning documents are not executed within six months after the delivery of the drafts, your file may be transferred to inactive status. In that situation, we reserve the right to bill the agreed-upon fee and we will not send out any further reminders about completing the estate planning process. Of course, you may reactivate the estate planning project later on, and we will be glad to see it through to completion.

## WARNING REGARDING DATA SECURITY

Unless you specifically indicate to the contrary, we shall assume that we may use voice-mail, email, text-messaging, the Internet, and other electronic means to communicate with you or on your behalf. We may also use the cloud or other internet-based or electronic storage of materials contained in your file on a temporary or permanent basis.

You should understand that the use of these means of communication and information storage may increase the risk of an inadvertent disclosure of confidential information. We will make reasonable efforts and take reasonable precautions to prevent unauthorized disclosure of any of your confidential information. Please inform your attorney promptly if you do not want us to use these forms of communication and information storage in your case.

If you use your workplace computer for personal matters, it is likely that your employer has policies that allow others to have access to your information. Therefore, you should avoid using your workplace computer for sensitive communications and the storage of sensitive information.